

RFP DGS-2034
TELECOMMUNICATIONS CONSULTING SERVICES

SECTION III

CURRENT PROGRAM

A. BACKGROUND

RFP DGS 6023 and subsequently RFP DGS-6023A resulted in contract awards to eight (8) firms in February 1998 and February 2000. This contract replaced the previous master services agreement (MSA) 3010 consultant services contract that expired in June 1998.

DGS 6023 was developed to be a “living contract” with the ability for the State to add new consulting firms to the contract and expand the qualified technical categories of incumbent firms during the term of the contract. This was accomplished through re-issuance of RFP DGS-6023A.

B. DGS-TD’S NEED FOR TELECOMMUNICATIONS CONSULTING

Department of General Services, Telecommunications Division uses the current contract to provide highly qualified, highly experienced telecommunications consulting firms to assist governmental agencies in meeting their telecommunications needs in a timely and cost effective manner. Each contractor may be asked to participate in a variety of telecommunications related projects ranging widely in scope, schedule and cost.

The governmental agencies requesting telecommunications consulting services may be involved in projects that have been mandated by the California Legislature or projects related to telecommunications requirements to meet the needs of existing and new state programs. Other projects may involve a review and analysis (needs assessment) of an agency’s existing telecommunications equipment/services infrastructure for recommendations related to upgrading the existing telecommunications platform versus alternative equipment/ services replacement options. The latter case may involve, as a project deliverable, a Feasibility Study Report (FSR) that defines, within the proposed solution, the most effective method(s) of meeting the agency’s telecommunications needs.

In most cases, the contractor acts as an extension of DGS-TD, augmenting the internal DGS-TD resources available for assignment to a project or expanding the technological expertise base available to assist an agency. In either case, DGS-TD expects the contractor to become familiar with the wide range of consolidated services as defined in the State Administration Manual (SAM), Section 4500, and the State Telecommunications Management Manual (STMM). DGS-TD also provides support programs to agencies such as mobile radio, microwave, and

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E9-1-1 emergency services. DGS-TD may request that the contractors assist with assessment of existing consolidated voice and data services contracts, assist in the development of new services contracts, or in the development of new DGS-TD support programs, based upon the results of projects that define agencies needs.

C. TELECOMMUNICATIONS CONSULTING CATEGORIES

There are eighteen (18) categories of telecommunications consulting. Firms may be qualified in as few as one (1) and as many as all eighteen (18) categories.

1. Voice Systems Consulting - Local Area Network (LAN)
2. Voice Systems Consulting - Wide Area Network (WAN)
3. Data Systems Consulting - Local Area Network (LAN)
4. Data Systems Consulting - Wide Area Network (WAN)
5. Video Systems Consulting - Local Area Network (LAN)
6. Video Systems Consulting - Wide Area Network (WAN)
7. Radio Systems Consulting - Terrestrial Microwave
8. Radio Systems Consulting - Trunked Technology
9. Radio Systems Consulting - Fixed Base & Mobile
10. Technology Management Consulting - Evaluation of Evolving Technologies
11. Technology Management Consulting - Strategic Planning
12. Technology Management Consulting - Project Management
13. Technology Management Consulting - Training
14. Technology Management Consulting - Business Practices and Procedures
15. Technology Management Consulting - Regulatory and Governmental Issues
16. Technology Management Consulting - Public Safety, E9-1-1
17. Electrical Engineering, Power Systems Consulting
18. Structural Engineering Consulting

These categories partition various telecommunications applications by platform type. The objective of this partitioning is to associate and apply contractors' related experience and expertise to specific telecommunications categories. The categories relate to Local Area Network (LAN) equipment/service applications for voice, data, video, mobile radio, and microwave scenarios.

The categories associated with wide area telecommunications applications allow consultant firm experience and expertise to be indicated in a format that assists DGS-TD to better define transport interface requirements and statewide network backbone requirements for larger multi-location agencies. The other consulting services technical categories support specific DGS-TD telecommunications programs, or provide contract flexibility for evaluation of new telecommunications related technologies/services that are anticipated over the term of this contract.

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Category 17 (Electrical Engineering) and Category 18 (Structural Engineering) are unique in that these categories are considered “Professional Engineering” classifications under the state contract code (Government Code Section 4525 - 4529.5) as it relates to 4525 Retainer type contracts. Projects in these two (2) categories must meet the following conditions:

- The total cost associated with a single DGS-2034 project must not exceed \$25,000.00.
- Each project must be reviewed and approved by DGS Office of Legal Services prior to the project funding approval and work authorization (Formal Project Approval) documents being signed.

Note: There have been no DGS 6023A projects requiring telecommunications services related to Category 17 to date. No firms qualified for Category 18 during the initial RFP DGS 6023 procurement.

D. “QUALIFIED” CONSULTING FIRMS

Each category of telecommunications consulting in **Section VIII, TECHNICAL REQUIREMENTS**, has been defined in terms of what the State of California considers to be the attributes of a “qualified” consulting firm. The levels of knowledge and ability are expressed for each consulting category as (see **Exhibit III-A** for definitions):

- Technical Expertise, that is, the depth and breadth of technical knowledge in a particular telecommunications consulting category.
- Functional Application, that is, the utilization of technical expertise to solve an actual or representative problem(s) in a particular telecommunications consulting category.
- Required Experience, that is, the required number of comparable telecommunications consulting projects completed by the bidder (including subcontractors) in a particular telecommunications consulting category. Bidder’s may provide up to five (5) comparable consulting projects completed on a fee-for-service basis on or after June 1, 1996.
- Required Resources, that is, at a minimum, the number of professional consulting staff (including subcontractors) required to provide service in a particular telecommunications consulting category.

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E. CONSULTING LABOR CLASSIFICATIONS

Within each telecommunications consulting category, there are seven (7) labor classifications defining the skill levels required by the state. **Exhibit III-B** defines each of the following classifications:

- Manager
- Principal Engineer
- Principal Analyst
- Senior Engineer
- Senior Analyst
- Engineer
- Analyst

F. INDEPENDENT CONSULTING

To qualify in any consulting category, each consulting firm is required to provide to the State of California written substantiation of their knowledge and ability to provide sustained, **independent telecommunications consulting services** to multiple governmental agencies. Refer to the **Section VIII** for the specific requirements of each consulting category and to **Exhibit III-A** for a definition of terms.

G. CONTRACT UTILIZATION BY AGENCIES

When the need arises, governmental agencies contact DGS-TD regarding the need for telecommunications consulting assistance on projects. Approval by DGS-TD is required before any state agency can select telecommunications consultant services per the STMM Chapter 0400.

Upon a review and approval of the agency request for consulting services, the consulting firms qualified to participate in the agency's project (firms qualified in the specific technical or management categories associated with a particular project) are sent a project notification package. Telecommunications Project Proposal Request form TD 2034A is utilized for projects that are initiated and funded by DGS-TD. Form TD 2034B is utilized when the client agency will fund and manage the project directly (See **Exhibits III-C-1** and **III-C-2**).

The agency's project Scope of Work (SOW) is included as an attachment to the notification form. Initial meetings, interviews and or, opportunities to contact the agency's project manager for additional information about the project will be identified on the notification form or the agency's SOW prior to the project

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proposal due date (See **Exhibit III – D**, DGS 2034 Project Process Flow Diagram).

Each contractor's Project Proposal must contain the following project related information:

- Proposed project scope (definition)
- Proposed project tasks (identifying contractor's assigned resource, skill level and responsibility, and any anticipated governmental agency resource requirements)
- Proposed project task schedule (task start and end dates)
- Proposed project task deliverables and milestones
- Proposed project task costs

Unless the agency's request specifies otherwise, it is assumed that consulting service is required within a fifty (50) mile radius of the Capitol in Sacramento at the rates proposed by the bidder for each labor classification for each consulting category. However, there may be occasions when DGS-TD and/or the client agency may require project-related travel. In such cases, in addition to billable labor costs, all billable travel expenses shall be pre-approved by DGS-TD as part of the state's written Work Authorization for the project. Travel will be authorized and reimbursed at no more than the applicable government travel expense rate schedule in effect at the time service is provided. (See **Exhibit III-E** for examples of current DGS-TD travel reimbursement rates.)

The contractors' Project Proposals are reviewed with the requesting agency (regarding project scope, schedule, and/or resources), and a selection made based upon the greatest value-added benefit to the requesting governmental agency. Relevant experience of company and proposed staff, proposed methodology, specific desired skills and costs are factors that will be considered.

Note that any telecommunications consulting project deliverable that is a product of a written Work Authorization shall be in full compliance with applicable provisions of SAM, STMM, the Professional Engineers' Act (see California Business and Professional Code Sections 6700-6799), the California Public Utilities Commission (CPUC), the Federal Communications Commission (FCC), and any other regulatory provisions, as appropriate.

H. PROJECT ADMINISTRATION

Determination of any need for a performance bond from the contractor(s) is made on each project. The value of a performance bond, if required for a project, is based on the total project cost. The contractor(s) must provide the performance

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bond to DGS-TD within fifteen (15) working days of the final approval, approved Work Authorization, for the project.

Monthly written project status reports from the contractor to the DGS-TD contract administrator are required. In addition, annual DVBE participation reports are required.

A sub-contractor may be utilized by a prime contractor on a project. However, the sub-contractor(s) resume(s) and the project skill level assignment (per the appropriate bid hourly rate) for the sub-contractor(s) will be included in the Project Proposal for review and approval by the contracting agency and/or DGS-TD.

Amendments to the project scope, schedule and cost may be made with mutual consent of both the agency and the contractor, and approved by both parties in a written amendment to the Work Authorization. Amendments are subject to review and approval of DGS-TD.

DGS-TD applies an administrative fee for direct use of consulting contracts by agencies to recover the development and ongoing contract administrative costs. DGS-TD will identify and include the DGS-TD administrative fee on the agency's initial project funding approval documents for the client agency's approval and encumbrance of funds. The DGS-TD administrative fee is applied to the selected consulting firm's proposed project cost. DGS-TD will invoice the client agency directly for the administrative fee.

I. CONSULTING CONTRACTOR PERFORMANCE STANDARD

Contractors must provide satisfactory performance. If a governmental agency is not satisfied with the performance of a contractor, the performance of any representative of that firm, or finds that the contractor is not complying with the terms and conditions of this contract, DGS-TD will be notified immediately on a verbal basis. If the problem is not quickly resolved, written notification will be provided to all involved parties regarding the issue creating the difficulty. If the issue cannot be resolved jointly, between all involved parties, the contractor or specific consultant(s) may be replaced for unacceptable performance under the terms and conditions of this contract.

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EXHIBIT III-A
DEFINITION OF TERMS

comparable projects are defined to be of a similar scale and complexity to those of the State of California DGS-TD.

consolidated services is defined by the state as the joint use of telecommunications system resources for voice and data services. (Refer to Government Code Sections 15250-15254.)

corporate client is defined herein as any non-governmental client.

governmental client is defined herein as a public, fully tax-supported, non-profit entity typically at the federal, state, county, city, or a district level.

independent telecommunications consulting firm is defined by the state as a firm that does not have a beneficial interest that can be derived as a consequence of consulting activities and/or recommendations.

Independent consulting firms will not be:

1. a telecommunications equipment manufacturer (either a prime or a subsidiary),
2. an incumbent local exchange company (ILEC), a competitive local exchange company (CLEC), or an inter-exchange carrier (IXC) service provider,
3. a sales representative or account representative under contract with either number 1 or 2 above,
4. a reseller of local or long distance telecommunications services.

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EXHIBIT III-B
CONSULTING LABOR CLASSIFICATIONS

1. Manager: A partner or senior corporate officer directly involved in the application of the professional skills of the consulting firm. Personnel at this level should have a minimum of five (5) years experience appropriate to the category(s) bid, with at least three (3) of those years at a level where they were the ultimate party to approve the firm's work.
2. Principal Engineer: The highest level person in the specialized field of engineering. Personnel at this level should have a minimum of ten (10) years experience appropriate to the category(s) bid, with at least one (1) year at a level where they were authorized to approve the firm's work. For any one (1) consulting category, any one (1) candidate shall be able to qualify for only one (1) engineer labor classification.
3. Principal Analyst: The highest level person performing non-engineering technical analysis. Personnel at this level should have a minimum of five (5) years experience appropriate to the category(s) bid, with at least one (1) year at a level where they were authorized to approve the firm's work. For any one (1) consulting category, any one (1) candidate shall be able to qualify for only one (1) analyst labor classification.
4. Senior Engineer: A supervisory level person in the specialized field of engineering. Personnel at this level supervise, coordinate, and review the work of a staff of engineers and other personnel associated with an engineering deliverable (e.g., technicians, draftspersons, clerical support, etc.) Personnel at this level should have a minimum of seven (7) years experience appropriate to the category(s) bid, with at least one (1) year at the supervisory level. For any one (1) consulting category, any one (1) candidate shall be able to qualify for only one (1) engineer labor classification.
5. Senior Analyst: A supervisory level person performing non-engineering technical analysis. Personnel at this level supervise, coordinate, and review the work of a staff of analysts and support personnel. Personnel at this level should have a minimum of four (4) years experience appropriate to the category(s) bid, with at least one (1) year at the supervisory level. For any one (1) consulting category, any one (1) candidate shall be able to qualify for only one (1) analyst labor classification.
6. Engineer: A journeyman level in the specialized field of engineering performing engineering tasks applicable within each category. Personnel at this level may supervise support personnel such as technicians and draftspersons but do not supervise other engineers. Personnel at this level should have a minimum of five (5) years experience appropriate to the category(s) bid. For any one (1) consulting category, any one (1) candidate shall be able to qualify for only one (1) engineer labor classification.
7. Analyst: A journeyman level performing non-engineering technical analysis. Personnel at this level may supervise support personnel but do not supervise other analysts. Personnel at this level should have a minimum of three (3) years experience appropriate to the category(s) bid. For any one (1) consulting category, any one (1) candidate shall be able to qualify for only one (1) analyst labor classification.

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EXHIBIT III-C-1

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<p style="text-align: center;">STATE OF CALIFORNIA DEPARTMENT OF GENERAL SERVICES TELECOMMUNICATIONS DIVISION (TD) 601 Sequoia Pacific Boulevard Sacramento, California 95814-0282 DGS-2034 TELECOMMUNICATIONS CONSULTANT PROJECT PROPOSAL REQUEST (TYPE A) TD-2034A (Rev. 5-99)</p>	<div style="border-bottom: 1px solid black; margin-bottom: 5px; text-align: center;">Contractor Company Name</div> <div style="display: flex; justify-content: space-between; margin-bottom: 5px;"><div style="border-bottom: 1px solid black; width: 45%; text-align: center;">TD Proposal Number</div><div style="border-bottom: 1px solid black; width: 45%; text-align: center;">Date</div></div> <div style="text-align: center; margin-bottom: 5px;">Project Location:</div>
<p style="text-align: center;">FAX/E-MAIL TO CONTRACTOR INFORMATION</p> <p>Name: _____</p> <p>Voice #: _____</p> <p>FAX #: _____</p> <p>E-mail Addr.: _____</p> <p># of Pages: _____</p>	<p style="text-align: center;">FAX/E-MAIL BACK TO TD INFORMATION</p> <p>Name: _____</p> <p>Voice #: _____</p> <p>FAX #: _____</p> <p>E-mail Addr.: _____</p> <p># of Pages: _____</p>
<p style="text-align: center;">TD SUPPLIED PROJECT INFORMATION</p> <div style="border: 1px solid black; height: 100px; margin-bottom: 5px; padding: 5px;"><p>Project Description (attach additional sheets, if necessary):</p></div> <div style="display: flex; justify-content: space-between; margin-bottom: 5px;"><div>A project Surety (performance) Bond is required:</div><div><input type="checkbox"/> yes <input type="checkbox"/> no</div></div> <div style="display: flex; justify-content: space-between; margin-bottom: 5px;"><div>Additional project information attached: .</div><div><input type="checkbox"/> yes <input type="checkbox"/> no</div></div> <div style="display: flex; justify-content: space-between; margin-bottom: 5px;"><div>Requested project in-service date: .</div><div>_____</div></div> <div style="display: flex; justify-content: space-between; margin-bottom: 5px;"><div>Contact the TD before providing the proposal:</div><div><input type="checkbox"/> yes <input type="checkbox"/> no</div></div> <div style="display: flex; justify-content: space-between; margin-bottom: 5px;"><div>The TD employee to contact about this project:</div><div>Name: _____</div></div> <div style="display: flex; justify-content: space-between; margin-bottom: 5px;"><div></div><div>Voice #: _____</div></div> <div style="display: flex; justify-content: space-between; margin-bottom: 5px;"><div></div><div>FAX #: _____</div></div> <div style="display: flex; justify-content: space-between; margin-bottom: 5px;"><div>Return this request form as described below by the close of business</div><div>_____</div></div> <div style="display: flex; justify-content: space-between; margin-bottom: 5px;"><div>Send the project proposal as described below by the close of business</div><div>_____</div></div>	
<p style="text-align: center;">CONTRACTOR SUPPLIED PROJECT INFORMATION</p> <p>Are you interested in participating in this project?</p> <p>No; mark the box & send this form to TD, Attn.: Contracts Unit (FAX: 916-657-9129).</p> <p>Yes; do the following items:</p> <ol style="list-style-type: none">1. Mark the box & return this form by the deadline to the TD, Attn.: Contracts Unit.2. Develop the project proposal as described in RFP DGS-2034, Section III, G.:<ol style="list-style-type: none">a. "Proposed project scope (definition)"b. "Proposed project tasks (identifying contractor's assigned resource, skill level and...)"c. "Proposed project task schedule (task start and end dates)"d. "Proposed project task deliverables and milestones"e. "Proposed project task costs"f. Sign and date it as a quote by an authorized company person.g. Send it (with a copy of this form) by the proposal deadline to the TD, Attn.: Contracts Unit.	

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TELECOMMUNICATIONS CONSULTING SERVICES

EXHIBIT III-C -1

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INSTRUCTIONS
for
FORM TD-2034A

The TD-2034A form is used in conjunction with the requirements of RFP DGS-2034. It is designed for use in obtaining and involving independent Telecommunications Consultants for work on State of California, Telecommunications Division (TD) projects. It is used when the TD is directly involved, on behalf of an AGENCY (internal or external to the TD), with the contractor firm(s). The form is designed for faster turn-around of the information by either mailing (including E-mail) or FAXing to a contractor. It is also intended for use as cover sheet. This instruction sheet should accompany the form.

The following describes the requirements of the form:

Contractor Company Name

The name of the contracting firm, entered by the TD.

TD Proposal Number

A unique proposal serial number assigned by the TD to each individual TD-2034A form or group of forms as needed. It is issued for the purpose of tracking the proposal work. Note: This is not a contract or purchase order number.

Date

The date the proposal request is issued to the contractor by the TD. It is entered by the TD.

Location of Project Location

This is the location where the contractor will do the requested project work. It is entered either as a specific address or a broader geographical description by the TD. The **Project Description** area is useful if additional room is needed for this information.

FAX/E-MAIL TO CONTRACTOR INFORMATION

any attached documents from the TD to a contractor. This area is filled out entirely by the TD.

FAX/E-MAIL BACK TO TD INFORMATION

This is the information necessary to send by E-mail or FAX the TD-2034A form and the contractor attached documents from the contractor back to the TD. The TD should fill in the first four items and the contractor must fill in the “# [number] of pages” item.

TD SUPPLIED PROJECT INFORMATION

This information is supplied by the TD (along with the information in the upper right hand corner of the form) to describe the project and work requested of the contractor. It is a requirement that if the contractor does not respond back with the project proposal by the indicated deadline, the contractor is considered not interested in working on this project. The “Requested project in-service date” means that the project work described is ready for TD or AGENCY use on that date, though the contractor may need to do follow-up and/or clean-up work after that date. A Surety Bond is sometimes required depending upon the requirements of the project, such as for partial payments to a contractor. Contact the TD Contracts Unit for information on the need for and the use of this type of bond.

CONTRACTOR SUPPLIED PROJECT INFORMATION

This information is supplied by the contractor to the TD.

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EXHIBIT III-C -2

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<p style="text-align: center;">STATE OF CALIFORNIA DEPARTMENT OF GENERAL SERVICES TELECOMMUNICATIONS DIVISION (TD) 601 Sequoia Pacific Boulevard Sacramento, California 95814-0282 DGS-2034 TELECOMMUNICATIONS CONSULTANT PROJECT PROPOSAL REQUEST (TYPE B) <small>TD-2034B (Rev. 5-99)</small></p>	<div style="border-bottom: 1px solid black; margin-bottom: 5px; text-align: center;">Contractor Company Name</div> <div style="display: flex; justify-content: space-between; margin-bottom: 5px;"><div style="border-bottom: 1px solid black; width: 45%; text-align: center;">TD Proposal Number</div><div style="border-bottom: 1px solid black; width: 45%; text-align: center;">Date</div></div> <div style="text-align: center; margin-bottom: 5px;">Project Location:</div>
<p style="text-align: center;">FAX/F-MAIL TO CONTRACTOR INFORMATION</p> <p>Name: _____</p> <p>Voice #: _____</p> <p>FAX #: _____</p> <p>E-mail Addr.: _____</p> <p># of Pages: _____</p>	<p style="text-align: center;">FAX/F-MAIL BACK TO AGENCY INFORMATION</p> <p>Name: _____</p> <p>Voice #: _____</p> <p>FAX #: _____</p> <p>E-mail Addr.: _____</p> <p># of Pages: _____</p>
<p style="text-align: center;">TD SUPPLIED PROJECT INFORMATION</p> <div style="border: 1px solid black; height: 100px; margin-bottom: 5px; padding: 5px;">Project Description (attach additional sheets, if necessary):</div> <div style="display: flex; justify-content: space-between; margin-bottom: 5px;"><div>A project Surety (performance) Bond is required:</div><div><input type="checkbox"/> yes <input type="checkbox"/> no</div></div> <div style="display: flex; justify-content: space-between; margin-bottom: 5px;"><div>Additional project information attached: .</div><div><input type="checkbox"/> yes <input type="checkbox"/> no</div></div> <div style="display: flex; justify-content: space-between; margin-bottom: 5px;"><div>Requested project in-service date: .</div><div>_____</div></div> <div style="display: flex; justify-content: space-between; margin-bottom: 5px;"><div>Contact the TD before providing the proposal:</div><div><input type="checkbox"/> yes <input type="checkbox"/> no</div></div> <div style="display: flex; justify-content: space-between; margin-bottom: 5px;"><div>The TD employee to contact about this project: Name:</div><div>_____</div></div> <div style="display: flex; justify-content: space-between; margin-bottom: 5px;"><div></div><div>Voice #: _____</div></div> <div style="display: flex; justify-content: space-between; margin-bottom: 5px;"><div></div><div>FAX #: _____</div></div> <div style="display: flex; justify-content: space-between; margin-bottom: 5px;"><div>Return this request form as described below by the close of business on:</div><div>_____</div></div> <div style="display: flex; justify-content: space-between; margin-bottom: 5px;"><div>Send the project proposal as described below by the close of business on:</div><div>_____</div></div>	
<p style="text-align: center;">CONTRACTOR SUPPLIED PROJECT INFORMATION</p> <p>Are you interested in participating in this project?</p> <p style="margin-left: 20px;">No; mark the box & send this form to TD, Attn.: Contracts Unit (FAX: 916-657-9129) & the AGENCY.</p> <p style="margin-left: 20px;">Yes; do the following items:</p> <ol style="list-style-type: none">Mark the box & return this form by the deadline to the TD, Attn.: Contracts Unit & the AGENCY.Develop the project proposal as described in RFP DGS-2034, Section III, G.:<ol style="list-style-type: none">a. "Proposed project scope (definition)"b. "Proposed project tasks (identifying contractor's assigned resource, skill level and....)"c. "Proposed project task schedule (task start and end dates)"d. "Proposed project task deliverables and milestones"e. "Proposed project task costs"f. Sign and date it as a quote by an authorized company person.g. Send it (with a copy of this form) by the proposal deadline to the AGENCY.	

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EXHIBIT III-C -2

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INSTRUCTIONS
for
FORM TD-2034B

The TD-2034B form is used in conjunction with the requirements of RFP DGS-2034. It is designed for use in obtaining and involving independent Telecommunications Contractors for work on State of California, Client Agency projects. It is used when an AGENCY (external to the TD) is directly involved with the contractor firm(s), once notification to any contractor is established by the TD. The form is designed for faster turn-around of the information by either mailing (including E-mail) or FAXing to a contractor. It is also intended for use as cover sheet. This instruction sheet should accompany the form.

The following describes the requirements of the form:

Contractor Company Name

The name of the contracting firm, entered by the TD.

TD Proposal Number

A unique proposal serial number assigned by the TD to each individual TD-2034B form or group of forms as needed. It is issued for the purpose of tracking the proposal work. Note: This is not a contract or purchase order number.

Date

The date the proposal request is issued to the contractor by the TD. It is entered by the TD.

Project Location

This is the location where the contractor will do the requested project work. It is entered either as a specific address or a broader geographical description. The **Project Description** area is useful if additional room is needed for this information.

FAX/E-MAIL TO CONTRACTOR INFORMATION

This is the information necessary to send by E-mail or FAX the TD-2034B form, this instruction sheet and any attached documents from the TD to a contractor. This area is filled out entirely by the TD.

FAX/E-MAIL BACK TO AGENCY INFORMATION

This is the information necessary to send by E-mail or FAX the TD-2034B form and the contractor attached documents from the contractor back to the CLIENT AGENCY with a copy to TD.

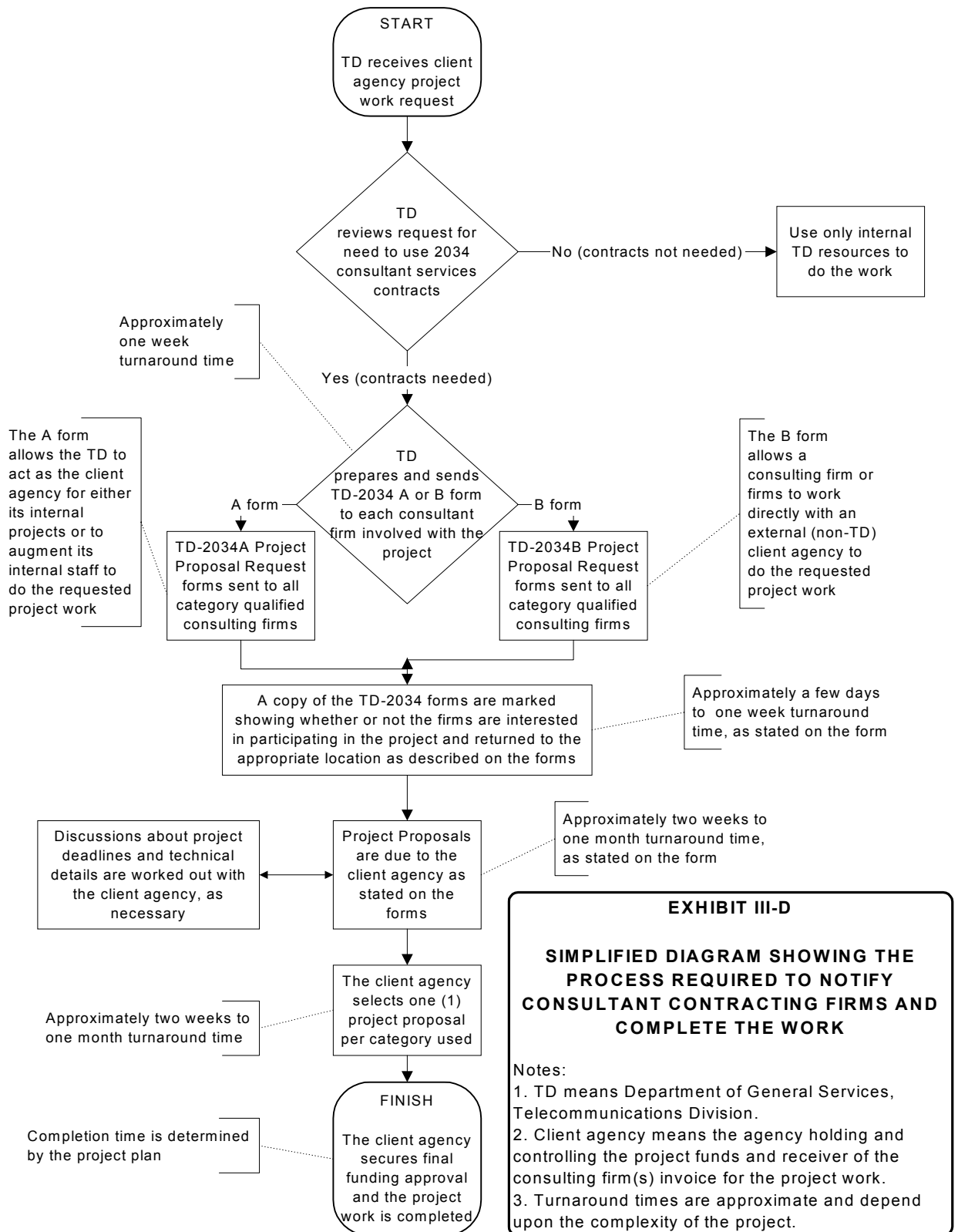
TD SUPPLIED PROJECT INFORMATION

This information is supplied by the TD (along with the information in the upper right hand corner of the form) to describe the project and work requested of the contractor. It is a requirement that if the contractor does not respond back with the project proposal by the indicated deadline, the contractor is considered not interested in working on this project. The "Requested project in-service date" means that the project work described is ready for TD or AGENCY use on that date, though the contractor may need to do follow-up and/or clean-up work after that date. A Surety Bond is sometimes required depending upon the requirements of the project, such as for partial payments to a contractor. Contact the TD Contracts Unit for information on the need for and the use of this type of bond.

CONTRACTOR SUPPLIED PROJECT INFORMATION

This information is supplied by the contractor to the TD and the AGENCY.

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EXHIBIT III-E
DGS-TD TRAVEL REIMBURSEMENT
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NOTE: These are excerpts from travel instructions for DGS-TD employees. They are subject to policy change. Approvals for consultant travel reimbursement will be subject to the rules in effect at time of travel. This information pertains to Represented employees of the State of California.

MEAL INFORMATION

Represented employees are reimbursed according to the amounts in **Table 1** below; this table is for all travel meals, except as noted below. If you are claiming non-commercial lodging, refer to **Table 2** on page 2 under **LODGING INFORMATION**.

REPRESENTED EMPLOYEES			
TYPE	ACTUAL AMOUNT	FRACTIONAL DAY	
		TRIP STARTING TIME	TRIP ENDING TIME
Breakfast	Up to \$6.00	At or before 6 AM	At or after 8 AM
Lunch ¹	Up to \$10.00	At or before 11 AM	At or after 2 PM
Dinner	Up to \$18.00	At or before 5 PM	At or after 7 PM
Incidentals	Up to \$6.00	Only available for each 24 hour period	
Daily Total	Up to \$40.00		
¹ Only for trips lasting over 24 hours			

Table 1

You may only claim up to the maximum amounts shown above for actual meal and incidental expenses incurred; receipts are not required.

If a meal is included in the price of an airline ticket, seminar, or is otherwise provided at no cost to you, you may not claim that meal on your Travel Expense Claim (TEC) form.

When you purchase a meal at a State institution, you can claim the actual cost of these meals, provided that you are more than 50 miles away from headquarters.

Use the fractional day time criteria in the appropriate table, *above*, for the day before or the day after a trip which included one full day of travel.

You will *not* be reimbursed for lunch or incidentals on fractional days of travel less than 24 hours in length. Use the fractional day time criteria in the appropriate table, *above*, paying attention to any notes associated with the times.

When claiming more than one meal on the same day, itemize.

Overtime Meals: Represented employees must submit a receipt for any overtime meals, up to \$8.00. You cannot claim more than three overtime meal allowances during any 24 hour period.

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EXHIBIT III-E
DGS-TD TRAVEL REIMBURSEMENT
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LODGING INFORMATION

LODGING TYPE	EMPLOYEE TYPE	
	REPRESENTED	NON-REPRESENTED
In-State, Short Term, With Receipts	Up to \$84.00 ^{1,2}	Up to \$84.00 ^{1,2}
In-State, Short Term, Without Receipts	\$24.99	\$24.00
Conferences, State Sponsored	Up to \$110.00 ^{1,3}	Up to \$110.00 ^{1,3}
Conferences, Non-State Sponsored	Up to \$140.00 ^{1,3}	Up to \$140.00 ^{1,3}
Non-Commercial, 12 or More Hours	\$23.00	\$24.00
Non-Commercial, Less than 12 Hours	\$23.50 ⁴	\$24.00 ⁴
¹ Plus tax. ² Reimbursement for greater amount requires prior approval by the Division Chief on a GS-12. ³ Requires prior approval of the Division Chief. Reimbursement for amounts greater than the totals listed require prior approval by DPA. Receipts are always required . ⁴ Meals or lodging.		

Table 2

You are allowed to claim reimbursement for the tax on lodging receipts above the allowable reimbursement rate. For example, if the lodging rate is \$84 and the tax is \$10, you can claim up to \$94 with no prior approval—\$84 of the reimbursement for the lodging and \$10 for the tax.

All requests must be in writing and include the following information.

- I. The name and address of the establishment where you plan to stay.
- II. The actual amount of the anticipated expenses.
- III. The reason(s) why it is necessary to incur expenses in excess of \$84.00.
- IV. List of all employees attending. If more than one employee attends, attach an explanation of why more than one employee must attend.

Non-commercial lodging is a trailer, motor home, camper, or a private home. For example, if you stay with a relative or friend while on State business, you will only be eligible for reimbursement at the non-commercial rate.

If you are approved to travel with family members, you can claim only the cost of a room for yourself and must pay the difference for your family members.

TRANSPORTATION INFORMATION

Reimbursement rates when you are authorized to use privately owned transportation instead of a State vehicle is 34 cents per mile, and the certified specialized vehicle rate is up to 37 cents per mile. Mileage is reimbursable when attending meetings or training classes.

If you are authorized to fly to your destination, you must only claim the cost of the most reasonable airfare available.

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EXHIBIT III-F
DGS-2034 INVOICE SAMPLE

COMPANY NAME _____
DGS-2034 PROJECT NUMBER _____
INVOICE PERIOD _____

Project Task (WBS)	Task Description	Project Resource	Skill Level Rate	Hours	Cost
TOTAL					

Pre Approved Travel Expense Expense Item	Resource	Date Expense Incurred	Cost
TOTAL			